To watch the ClaimWizard Academy videos, please visit https://academy.claimwizard.com/getting-started/. Total video watch time is 18 minutes 30 seconds across four videos.

In order to get the best benefit from the ClaimWizard system an understanding of the 'basics' is helpful. In this Getting Started Video Guide there are four video walkthrough screencasts that will introduce you to the major sections and processes in ClaimWizard:

1. Basic Navigation
2. Workbench Basics
3. Manually Adding a New Client, Property & Claim
4. Updating a Claim

After each video are "Review Questions" so that you can quiz yourself on knowledge gained in each video. Our recommendation is to watch the videos as much as you need to get the concepts, answer the "Review Questions" yourself, then go back and re-watch the video to check your answers!

1. Basic Navigation

Video Length: 3 minutes 10 seconds

How to get around in ClaimWizard, what each section contains, how to access each section.

1. Name each section of ClaimWizard (left-side tabs).
2. What content is accessed via the Home Tab?
3. What does clicking on a blue file / claim number or policy holder information do?
4. How can you search for information in ClaimWizard?
5. How can you view a list of all open claims?
6. How do you find a list of all clients?
7. How do you find a list of all third party vendors?

2. Workbench Basics

Video Length: 5 minutes 38 seconds

Detailed information about what can be found on the Home / Workbench tab.

General:

1. What views does the Workbench contain?

Dashboard:

1. What is the difference between the Workbench view of “All Claims” and “My Claims”?
2. How to you sort content in the Workbench?
3. How to rearrange columns in the Workbench?
4. How to you filter content in the Workbench?
5. How to you remove filtering in the Workbench?
6. How to you view, sort, and filter Claim Alerts?
7. How do you find out how a claim wound up with a specific Claim Alert?
8. What do the color coding of Red/ Yellow / Gray?
9. How to you sort by Phase?
10. How do you print a list of content in the Workbench?

Action Items:

1. How do you sort by Action Item Age, Due Date or Phase?
2. How do you edit a task or claim?
3. How do you switch between “Your Action Items” and “All Action Items”?
4. How to you mark a task as completed?
5. Where are the completed tasks recorded?

3. Manually Adding a New Client, Property & Claim

How to create, a new client, property, and claim in ClaimWizard.

Video Length: 3 minutes 32 seconds

1. What is Fast Entry?
2. How to you enter in a new Prospect?
3. How does a Prospect become a Client?
4. How to you add a Property to a Client?
5. How to you add a Claim to a Property?
6. What Contract Details are needed to open a Claim?
7. What Carrier Information is needed on a Claim?
8. What Mortgage Information is needed on a Claim?
9. How do you assign Claim Personnel to a Claim?
10. How to you assign a Claim Personnel ROLE to a Claim?
11. How do you add or edit information on a Client, Property or Claim?

4. Updating a Claim

Video Length: 6 minutes 10 seconds

How to update a claim in ClaimWizard.

General:

1. What ways can you find the claim you would like to update?

Log Entry:

1. How to you enter a Log Entry?
2. How do you backdate an entry?
3. What is the Log Entry Source?
4. What is an Activity Template?
5. How can you get an Activity Template customized?
6. How do you search for a specific Activity Template?

Action Items:

1. How can you add an Action Item?
2. What information is contained in an Action Item?
3. How can you assign personnel for an Action Item?
4. What does the STAR on an Action Item do?

Upload Files:

1. How do you browse your local computer to upload a file to ClaimWizard?
2. How to you drag and drop a file to upload to ClaimWizard?
3. How do you create a new folder for uploaded files?

Claim Phase:

1. What is a Claim Phase?
2. How to you manually update a Claim Phase?
3. Where is the Claim Phase displayed?